

White Spirits and RTDs - UK - November 2013

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"Brands at the premium tier in particular should tread carefully when experimenting with flavour as it risks masking the 'pure' flavour of the drink, something which is so important for premium spirits."

– Chris Wisson, Senior Drinks Analyst

This report looks at the following areas:

- How can spirit brands build standout in the market?
- What are the risks associated with flavour innovation?
- Can tequila finally break through in the UK?
- How can the RTDs market arrest its decline?

White spirits and RTDs are a popular part of the UK drinks landscape, with 67% of adults drinking them. The market is often seen as more fast-moving and innovative than dark spirits, with brands such as Smirnoff and Absolut driving this image. Value sales rose in 2013 with much of this growth fuelled by inflation and trading up to the premium tier as volume sales are broadly flat.

Vodka remains the market's driving force. The spirit's 'neutral' flavour means that it has been able to tap into the current popularity of flavour innovation to drive growth. As in many drinks markets, mixability is a key trend and younger drinkers in particular are now often drinking spirits such as rum and vodka with mixers, or looking for flavoured variants of their favourites. As well as the market housing a number of well-known brands, own-label vodka is also popular and enables consumers to engage with the market at lower price points.

Gin and white rum are also continuing to grow in value terms, while tequila/mezcal remains a small influence but one which may be ready to start making its mark in the UK. RTDs continue to struggle, although the newer type of pre-mix drinks in cans may provide cause for cautious optimism.

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